



Beauty and Personal Care in India

July 2024

Table of Contents

Beauty and Personal Care in India

EXECUTIVE SUMMARY

Beauty and personal care in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for beauty and personal care?

MARKET DATA

Table 1 - Sales of Beauty and Personal Care by Category: Value 2018-2023

Table 2 - Sales of Beauty and Personal Care by Category: % Value Growth 2018-2023

Table 3 - GBO Company Shares of Beauty and Personal Care: % Value 2019-2023

Table 4 - NBO Company Shares of Beauty and Personal Care: % Value 2019-2023

Table 5 - LBN Brand Shares of Beauty and Personal Care: % Value 2020-2023

Table 6 - Penetration of Private Label in Beauty and Personal Care by Category: % Value 2018-2023

Table 7 - Distribution of Beauty and Personal Care by Format: % Value 2018-2023

Table 8 - Distribution of Beauty and Personal Care by Format and Category: % Value 2023

Table 9 - Forecast Sales of Beauty and Personal Care by Category: Value 2023-2028

Table 10 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby and Child-Specific Products in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Baby and child-specific products continues to see growth despite the slowdown in the birth rate

Johnson & Johnson (India) retains its leading position, and prioritises ingredient transparency

Natural and clean beauty claims continue to have significant importance amongst parents

PROSPECTS AND OPPORTUNITIES

Growing number of dual-income households set to boost sales of baby and child-specific products

Expansion of D2C brands into the category to drive growth in the forecast period

Baby and child-specific sun care holds potential for brands to expand their offerings

CATEGORY DATA

Table 11 - Sales of Baby and Child-specific Products by Category: Value 2018-2023

Table 12 - Sales of Baby and Child-specific Products by Category: % Value Growth 2018-2023

Table 13 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2018-2023

Table 14 - NBO Company Shares of Baby and Child-specific Products: % Value 2019-2023

Table 15 - LBN Brand Shares of Baby and Child-specific Products: % Value 2020-2023

Table 16 - LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2020-2023

Table 17 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2020-2023

Table 18 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2020-2023

Table 19 - Forecast Sales of Baby and Child-specific Products by Category: Value 2023-2028

Table 20 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2023-2028

Table 21 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2023-2028

Bath and Shower in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Bath and shower records mid-single digit value growth in 2023, driven by increases for body wash/shower gel and intimate washes
Surge in popularity of skin care-infused bath and shower products as the focus shifts beyond cleansing
Hindustan Unilever continues to lead bath and shower with flagship brands

PROSPECTS AND OPPORTUNITIES

While bar soap is set to show a muted increase, the popularity of body wash/shower gel will drive growth in the forecast period
Digital marketing and social media will continue to be crucial in capturing the attention of younger consumers
Premiumisation to differentiate bath and shower brands in India

CATEGORY DATA

Table 22 - Sales of Bath and Shower by Category: Value 2018-2023

Table 23 - Sales of Bath and Shower by Category: % Value Growth 2018-2023

Table 24 - Sales of Bath and Shower by Premium vs Mass: % Value 2018-2023

Table 25 - NBO Company Shares of Bath and Shower: % Value 2019-2023

Table 26 - LBN Brand Shares of Bath and Shower: % Value 2020-2023

Table 27 - LBN Brand Shares of Premium Bath and Shower: % Value 2020-2023

Table 28 - Forecast Sales of Bath and Shower by Category: Value 2023-2028

Table 29 - Forecast Sales of Bath and Shower by Category: % Value Growth 2023-2028

Table 30 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2023-2028

Colour Cosmetics in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers' emphasis on beauty fuels growth in colour cosmetics, propelled by traction of hydrating claim
Multipurpose and innovative product launches by mass brands attract Indian consumers
India's large teen population offers new opportunities for colour cosmetics brands

PROSPECTS AND OPPORTUNITIES

Promising economic landscape will continue to attract international premium brands to India
Omnichannel strategies will fuel the growth of colour cosmetics in India
Premiumisation will fuel future growth and promote sales progression

CATEGORY DATA

Table 31 - Sales of Colour Cosmetics by Category: Value 2018-2023

Table 32 - Sales of Colour Cosmetics by Category: % Value Growth 2018-2023

Table 33 - NBO Company Shares of Colour Cosmetics: % Value 2019-2023

Table 34 - LBN Brand Shares of Colour Cosmetics: % Value 2020-2023

Table 35 - LBN Brand Shares of Eye Make-up: % Value 2020-2023

Table 36 - LBN Brand Shares of Facial Make-up: % Value 2020-2023

Table 37 - LBN Brand Shares of Lip Products: % Value 2020-2023

Table 38 - LBN Brand Shares of Nail Products: % Value 2020-2023

Table 39 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2020-2023

Table 40 - Forecast Sales of Colour Cosmetics by Category: Value 2023-2028

Table 41 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2023-2028

Deodorants in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Deodorants shows healthy growth owing to sports and outdoor activities
Deodorant roll-ons is gaining prominence as brands expand their personal care portfolios
Vini Cosmetics continues to lead deodorants with its brand Fogg

PROSPECTS AND OPPORTUNITIES

Body mists expected to grow as consumers embrace lighter, more refreshing fragrances for daily usage
Ingredient conscious-consumers set to look for clean ingredients in deodorants
Deodorants anticipated to face strong competition from mass fragrances in the forecast period

CATEGORY DATA

Table 42 - Sales of Deodorants by Category: Value 2018-2023
Table 43 - Sales of Deodorants by Category: % Value Growth 2018-2023
Table 44 - Sales of Deodorants by Premium vs Mass: % Value 2018-2023
Table 45 - NBO Company Shares of Deodorants: % Value 2019-2023
Table 46 - LBN Brand Shares of Deodorants: % Value 2020-2023
Table 47 - LBN Brand Shares of Premium Deodorants: % Value 2020-2023
Table 48 - Forecast Sales of Deodorants by Category: Value 2023-2028
Table 49 - Forecast Sales of Deodorants by Category: % Value Growth 2023-2028
Table 50 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2023-2028

Depilatories in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

In 2023 depilatories sees significant growth, recovering from the effects of the pandemic
New products and formats for painless hair removal on the rise
Reckitt Benckiser continues to lead depilatories with its Veet brand

PROSPECTS AND OPPORTUNITIES

Companies set to focus on raising awareness to expand the consumer base
Depilatories will continue to face competition from salons, at-home salon services, and laser hair treatments
Opportunity for feminine hygiene brands to enter depilatories to create an ecosystem

CATEGORY DATA

Table 51 - Sales of Depilatories by Category: Value 2018-2023
Table 52 - Sales of Depilatories by Category: % Value Growth 2018-2023
Table 53 - Sales of Women's Razors and Blades by Type: % Value Breakdown 2019-2023
Table 54 - NBO Company Shares of Depilatories: % Value 2019-2023
Table 55 - LBN Brand Shares of Depilatories: % Value 2020-2023
Table 56 - Forecast Sales of Depilatories by Category: Value 2023-2028
Table 57 - Forecast Sales of Depilatories by Category: % Value Growth 2023-2028

Fragrances in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Fragrances in India showcases double-digit growth, fuelled by increased usage occasions
Premium women's fragrances remains the best-performing category in 2023
Miniature fragrances gain popularity across the mass and premium segments

PROSPECTS AND OPPORTUNITIES

Availability and accessibility of premium brands set to drive growth

Impulse purchases via hyperlocal platforms to accentuate growth for mass fragrances

Emerging trends in fragrance consumption to drive growth in the forecast period

CATEGORY DATA

Table 58 - Sales of Fragrances by Category: Value 2018-2023

Table 59 - Sales of Fragrances by Category: % Value Growth 2018-2023

Table 60 - NBO Company Shares of Fragrances: % Value 2019-2023

Table 61 - LBN Brand Shares of Fragrances: % Value 2020-2023

Table 62 - LBN Brand Shares of Premium Men's Fragrances: % Value 2020-2023

Table 63 - LBN Brand Shares of Premium Women's Fragrances: % Value 2020-2023

Table 64 - Forecast Sales of Fragrances by Category: Value 2023-2028

Table 65 - Forecast Sales of Fragrances by Category: % Value Growth 2023-2028

Hair Care in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Salon professional hair care maintains the fastest growth in 2023

Innovation in colourants attracts younger consumers to the category

Hair care brands extend their portfolios to cater to India's diverse hair textures and needs

PROSPECTS AND OPPORTUNITIES

Clean formulations in hair care will continue to be important for ingredient-conscious consumers

Bond repair likely to be an important part of hair care in the forecast period

Demand for hair growth products set to surge as environmental and lifestyle challenges persist in India

CATEGORY DATA

Table 66 - Sales of Hair Care by Category: Value 2018-2023

Table 67 - Sales of Hair Care by Category: % Value Growth 2018-2023

Table 68 - Sales of Hair Care by Premium vs Mass: % Value 2018-2023

Table 69 - NBO Company Shares of Hair Care: % Value 2019-2023

Table 70 - NBO Company Shares of Salon Professional Hair Care: % Value 2019-2023

Table 71 - LBN Brand Shares of Hair Care: % Value 2020-2023

Table 72 - LBN Brand Shares of Colourants: % Value 2020-2023

Table 73 - LBN Brand Shares of Salon Professional Hair Care: % Value 2020-2023

Table 74 - LBN Brand Shares of Styling Agents: % Value 2020-2023

Table 75 - LBN Brand Shares of Premium Hair Care: % Value 2020-2023

Table 76 - Forecast Sales of Hair Care by Category: Value 2023-2028

Table 77 - Forecast Sales of Hair Care by Category: % Value Growth 2023-2028

Table 78 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2023-2028

Men's Grooming in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Growth continues in men's grooming as men focus on their appearance and grooming

Premiumisation in men's skin care and hair care drives growth

The rise of D2C brands is transforming men's grooming

PROSPECTS AND OPPORTUNITIES

Digital engagement and e-commerce set to drive growth in men's grooming in India

Innovative products beyond beard grooming to attract both Gen Z and Millennial men

Hydrating claim will continue to be popular in men's skin care in the forecast period

CATEGORY DATA

Table 79 - Sales of Men's Grooming by Category: Value 2018-2023

Table 80 - Sales of Men's Grooming by Category: % Value Growth 2018-2023

Table 81 - Sales of Men's Razors and Blades by Type: % Value Breakdown 2020-2023

Table 82 - Sales of Men's Skin Care by Type: % Value Breakdown 2020-2023

Table 83 - NBO Company Shares of Men's Grooming: % Value 2019-2023

Table 84 - LBN Brand Shares of Men's Grooming: % Value 2020-2023

Table 85 - LBN Brand Shares of Men's Razors and Blades: % Value 2020-2023

Table 86 - Forecast Sales of Men's Grooming by Category: Value 2023-2028

Table 87 - Forecast Sales of Men's Grooming by Category: % Value Growth 2023-2028

Oral Care in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Oral care sees solid single-digit value growth in 2023

Teeth whitening claims continue to appeal to Indian consumers

Colgate continues to lead oral care in India

PROSPECTS AND OPPORTUNITIES

Low per capita consumption paves the way for expansion in oral care

Urban consumers to prioritise functionality and efficacy amidst rising disposable incomes

Retail offline will continue to be the dominant sales channel for oral care products in India

CATEGORY DATA

Table 88 - Sales of Oral Care by Category: Value 2018-2023

Table 89 - Sales of Oral Care by Category: % Value Growth 2018-2023

Table 90 - Sales of Toothbrushes by Category: Value 2018-2023

Table 91 - Sales of Toothbrushes by Category: % Value Growth 2018-2023

Table 92 - Sales of Toothpaste by Type: % Value Breakdown 2019-2023

Table 93 - NBO Company Shares of Oral Care: % Value 2019-2023

Table 94 - LBN Brand Shares of Oral Care: % Value 2020-2023

Table 95 - LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2020-2023

Table 96 - LBN Brand Shares of Toothpaste: % Value 2020-2023

Table 97 - Forecast Sales of Oral Care by Category: Value 2023-2028

Table 98 - Forecast Sales of Oral Care by Category: % Value Growth 2023-2028

Table 99 - Forecast Sales of Toothbrushes by Category: Value 2023-2028

Table 100 - Forecast Sales of Toothbrushes by Category: % Value Growth 2023-2028

Skin Care in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Ingredient transparency and targeted formulations propel growth in skin care

The competition intensifies in skin care

Growing emphasis on moisture drives demand for hydrating skin care solutions

PROSPECTS AND OPPORTUNITIES

Rising preference for minimalistic skin care to reshape consumers' skin care routine in India

E-commerce beauty platforms set to drive growth and engagement for skin care

Rising demand for premium skin care to drive value growth for the category

CATEGORY DATA

Table 101 - Sales of Skin Care by Category: Value 2018-2023

Table 102 - Sales of Skin Care by Category: % Value Growth 2018-2023

Table 103 - NBO Company Shares of Skin Care: % Value 2019-2023

Table 104 - LBN Brand Shares of Skin Care: % Value 2020-2023

Table 105 - LBN Brand Shares of Basic Moisturisers: % Value 2020-2023

Table 106 - LBN Brand Shares of Anti-agers: % Value 2020-2023

Table 107 - LBN Brand Shares of Firming Body Care: % Value 2020-2023

Table 108 - LBN Brand Shares of General Purpose Body Care: % Value 2020-2023

Table 109 - LBN Brand Shares of Premium Skin Care: % Value 2020-2023

Table 110 - Forecast Sales of Skin Care by Category: Value 2023-2028

Table 111 - Forecast Sales of Skin Care by Category: % Value Growth 2023-2028

Sun Care in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sun care maintains double-digit value growth in 2023, on the back of the extended summer

Diverse formats facilitate the adoption of sun protection amongst Indian consumers

The competition intensifies in sun care in India

PROSPECTS AND OPPORTUNITIES

Growing consumer awareness set to increase the penetration of sun care

Sun protection products with skin care or cosmetic properties likely to generate demand amongst consumers

Retail e-commerce will drive growth in sun care in India

CATEGORY DATA

Table 112 - Sales of Sun Care by Category: Value 2018-2023

Table 113 - Sales of Sun Care by Category: % Value Growth 2018-2023

Table 114 - NBO Company Shares of Sun Care: % Value 2019-2023

Table 115 - LBN Brand Shares of Sun Care: % Value 2020-2023

Table 116 - LBN Brand Shares of Premium Adult Sun Care: % Value 2020-2023

Table 117 - Forecast Sales of Sun Care by Category: Value 2023-2028

Table 118 - Forecast Sales of Sun Care by Category: % Value Growth 2023-2028

Premium Beauty and Personal Care in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Premium beauty and personal care sees double-digit growth, surpassing growth in the mass segment in India

Retail e-commerce fuels the capitalisation of international premium brands in India

Estée Lauder Cos Inc strengthens its position in premium beauty and personal care

PROSPECTS AND OPPORTUNITIES

India's promising economic landscape expected to boost sales in premium beauty and personal care

Instrumental impact of social media will continue to increase penetration of premium beauty and personal care products in India

Small luxuries will facilitate demand for premium beauty and personal care products in the forecast period

CATEGORY DATA

Table 119 - Sales of Premium Beauty and Personal Care by Category: Value 2018-2023

Table 120 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2018-2023

Table 121 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2019-2023

Table 122 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2020-2023

Table 123 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2023-2028

Table 124 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2023-2028

Mass Beauty and Personal Care in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Strong growth for mass beauty and personal care, fuelled by colour cosmetics and sun care

Multi-benefit products fuel consumer interest in the mass segment

Miniature product packs gain popularity amongst mass beauty consumers

PROSPECTS AND OPPORTUNITIES

Mass brands set to prioritise innovation and premiumisation in the forecast period

Mass retailers in India set to explore beauty with expanded private label offerings

An omnichannel approach will continue to strengthen the distribution network for mass beauty and personal care brands

CATEGORY DATA

Table 125 - Sales of Mass Beauty and Personal Care by Category: Value 2018-2023

Table 126 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2018-2023

Table 127 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2019-2023

Table 128 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2020-2023

Table 129 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2023-2028

Table 130 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/beauty-and-personal-care-in-india/report.